



**UNIVERSITY
ADVANCEMENT**

University of NORTH ALABAMA

**Advancement Update
March 13, 2020**

Items of significance that have occurred since the November 15th Foundation Board Meeting:

Noah Daniel Bishop (Son of Amy and Daniel Bishop) was born on Saturday, February 15th at 2:42 p.m.

End of Year giving - between December 18, 2019 – January 3, 2020 – we received:

- Received 111 new gifts
- Received \$264,871.15 in new cash/pledges
 - This excludes the \$25,719.74 in pledge payments that were also processed.

On January 13, 2020 we had our 2nd of 5 Giving Days, Founders' Day Giving Day. This resulted in:

- 69 donors
- 77 gifts
- \$32,903.50 for the 1830 Fund

Developed and launched the Corporate Philanthropy Partner program. Please see attached.

- Secured a \$50,000 gift through this program on February 21, 2020.

In collaboration with UNA Athletics, developed and launched **CHAMPIONS OF THE PRIDE**, the philanthropic arm of UNA Athletics. Please see attached.

- The FY20 and FY21 focus is on donor acquisition.
- The FY20 and FY21 goals:
 - At least one CHAMPION OF THE PRIDE in every state.
 - At least 500 CHAMPIONS OF THE PRIDE in Alabama.
 - At least 1,000 CHAMPIONS OF THE PRIDE overall.
- 36,895 appeals dropped in the mail on February 24, 2020.
- If we achieve a 1% ROI, we will acquire 368 donors and \$36,800 in gifts.

Developed and launched an Alumni Relations brochure encouraging and empowering alumni to connect to UNA in whatever manner is most meaningful to them. Please see attached.

- 34,994 appeals dropped in the mail on February 24, 2020.
- If we achieve a 1% ROI, we will acquire 349 donors.

On March 6, 2020, the Board of Trustees officially approved two namings based on gifts and commitments received:

- The Delores and Weldon Cole Honors College
- The Jeff Eubanks Culinary Arts Program

Upcoming Activities:

- March 10, 2020, UNA Giving Day
 - Alumni and friends will be encouraged to give to their area of passion at UNA.
 - The UNA Foundation is using this opportunity to educate others about philanthropy.
 - Theme = Your Passion. Your Philanthropy. Every Gift. Every Giver. Matters.
- May 2, 2020, Derby Day



Office of
UNIVERSITY ADVANCEMENT

Become a Corporate Philanthropy Partner

The Corporate Philanthropy Partners program – a partnership between community and business leaders and the UNA Foundation – provides gifts that will empower the University of North Alabama to achieve the highest levels of excellence.

Why Partner With Us?

Becoming a member of the Corporate Philanthropy Partners program is an investment that will showcase your company's role as a leader in the community. In becoming a member of the Corporate Philanthropy Partners program, you are partnering with the senior leadership of the University of North Alabama to meet the University's greatest needs and emerging priorities.

Partnerships can be customized to your organization's philanthropic priorities and offer prestigious benefits, which may include:

Recognition in Foundation publications and on a Donor Recognition Wall in the University of North Alabama Administration building.

- Two versions of the UNA Magazine – electronic and printed
- Annual Report

A presence on our website and at various events.

- Donors of Distinction Dinner
- Alumni Summit
- Lions Under the Lights

Annual sharing of our list of Corporate Partners with all University of North Alabama Board of Trustees members and UNA Foundation Board of Directors.

Our Corporate Partners also receive invitations to special events and networking opportunities.

- Donors of Distinction Dinner
- Alumni Summit
- President's Celebration of the Season
- Various Athletic Events

Corporate Philanthropy Partners Program Levels

There are four annual giving levels:

Diamond	\$50,000 and above
Gold	\$30,000 to \$49,999
Silver	\$15,000 to \$29,999
Bronze	\$5,000 to \$14,999

Through your company's generous support, the University of North Alabama can continue to provide an excellent, innovative education, world-class faculty, and maintain our beautiful campus.

For more information, please contact Kevin Haslam, Vice President for University Advancement, at 256.765.4757 or khaslam@una.edu.

Thank you for thoughtfully considering making a significant difference by partnering with the University of North Alabama.

Alumni Relations | Communications and Marketing | Development | Financial and Database Services

UNA Box 5113, Florence, AL 35632-0001 | P: 256.765.4670 | una.edu/advancement

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Alumni Relations

The Office of Alumni Relations has been working effectively to set and establish measurable goals and outcomes for the purpose of connecting alumni and friends in 2020.

Here are the following goals that have been accomplished since the previous Foundation Board of Directors meeting:

- The Alumni Relations website received a Bronze Award by (CASE) Council for Advancement and Support of Education. The new alumni website was designed by UNA Web Developer Jeremy Woods and Assistant Web Assistant Matt Treiber in the Office of Communications and Marketing.
- The Central Mississippi Alumni Club reached their goal of fully funding the club's \$25,000 endowment scholarship goal.
- The National UNA Alumni Association hosted their first inaugural board retreat on February 8th at the University of North Alabama campus.
- Homecoming 2020 has been rescheduled for October 31. UNA will host Gardner-Webb University at 3:00 p.m. at Braly Stadium. The Homecoming theme is *Spirit of the Pride*..
- The Student Alumni Association (SAA) has been relaunched under the Office of Alumni Relations and confirmed by the Office of Student Engagement as a Distinguished University Service Organization.
- To help identify and keep track of alumni engagement and volunteers a "Get Involved" link has been added to the alumni website.
- Director of Alumni Relations Bishop Alexander has been meeting with various campus partners this semester to create opportunities for alumni to get involved with their alma mater. Some of these partnerships include the UNA Career Center, School of the Arts, Admissions, and the College of Academic Deans.
- The Office of Alumni Relations co-sponsored an alumni reception with the School of Arts on January 16, 2020, in Montgomery. The reception attracted 100 or more attendees who are music educators in the state of Alabama.



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Development

- Sent performance summaries for all endowed funds
- Hosted scholarship luncheon for donor/ recipient interaction
- Hosted Scott Kelly for the Distinguished Event Series
- Development team has been making regional visits in Alabama, Georgia, Mississippi, and Tennessee
- Completed 3/5 Giving Days:
 - Leo and Una Giving Day – November 18th
 - \$27,965.50 Raised
 - 141 Donors
 - 144 Gifts
 - Founders' Day Giving Day – January 13th
 - \$32,903.50 Raised
 - 69 Donors
 - 77 Gifts
 - UNA Giving Day – March 10th
 - Athletics Giving Day – May 19th
 - College Specific Giving Day – July 21st
- Dollars Raised as of 02/25/2020 * 40% of Fiscal Year Elapsed
 - Total Dollars Raised: \$2,786,687.26 59% of Goal
 - Annual Giving
 - \$874,851.07 202% of Goal
 - Athletics
 - \$307,203.10 64% of Goal
 - Planned Giving
 - \$1,395,000.00

*We are challenging ourselves to raise \$4,762,062.00 without including committed planned gifts, however, they will be included in the fundraising totals at the end of the FY.



Financial Services

- An audit of the University of North Alabama Foundation's financial statements for the fiscal year ending September 30, 2019 has been completed by CDPA, PC. The auditors stated that

"In our opinion, the financial statements present fairly, in all material respects, the financial position of the University of North Alabama Foundation as of September 30, 2019, and the changes in its net assets and its cash flows for the year ended in accordance with accounting principles generally accepted in the United States of America."

The auditors will also complete IRS Form 990 for the Foundation.

- Accountant Mallory Taylor left the Office of Advancement in November 2019 to relocate back to Georgia. Mallory was an exceptional employee and implemented many efficient and time saving processes during her time with us. In January 2020, Michele Aycock filled the open position. Michele comes to the office of Advancement with 16 years of nonprofit accounting experience. She filled the role of Financial Director with the YMCA of the Shoals prior to joining our team. We look forward to continuing to advance efficiencies and to serve our constituents to our upmost ability.
- The financial software utilized by the Financial Services staff was recently upgraded to a cloud-based program that includes many more options to increase the speed of data entry, provide more customized reports and the utilization of dashboards to communicate data.
- The Financial Services area completed the calculation of scholarships, program funds, professorships and Eminent Scholar awards available beginning in the fall of 2020 from our endowments and other restricted funds.



Marketing and Communications

As the Office of University Communications and Marketing, or UCM, continues to expand the University of North Alabama brand throughout the state and region, we also endeavor to be active participants with departments across campus in order to distribute and market programmatic and other information that will continue to build enrollment.

Since our last meeting, UCM has:

- Worked toward an extensive re-design of the *UNA Magazine*, which will extend the publication date to June. Issues will reflect changes on campus and incorporate news from each of the Colleges.
- Implemented a calendarized social media schedule so as to target specific audiences with messaging across our channels, covering news as well as current events on campus in a timely and engaging way.
- Engaged with the College of Business to publish its strategic report; the project involved writing and design, and it highlights some of the notable programs, faculty, and goals taking place throughout the College.
- Executed a new marketing strategy for the annual UNA Distinguished Events Series that featured Capt. Scott Kelly, who is also an astronaut. Attendance, engagement, and coverage of the event was among the best for this event.
- Engaged with several departments across campus, including the College of Education and Human Sciences, the Honors College, and the Department of Sociology, to implement online marketing campaigns targeting specific audiences in a variety of geographic areas throughout the region.
- Managed the implementation of a Speaker's Bureau in order to engage with outside entities through the use of expert sources on campus. Individuals from UNA's faculty and staff have been encouraged to participate.
- Continued to work toward an overall market analysis with our partners, Tatum Design, of Birmingham. The results will dictate future marketing efforts to demographics across the region.
- Continued to work alongside media outlets of all types – local, regional, and national – in order to further the messaging and branding of the University to the broadest base of constituencies.